



CVOEO GROWING MONEY PROGRAM CONFIDENTIAL INTAKE FORM



Name _____

Mailing Address with zip _____

Street Address (if different) _____

Primary phone: _____ Other phone: _____

Email (print clearly) _____

Birth date _____ Gender: Female Male

Ethnicity: Prefer not to answer African American American Indian Asian/Pacific Islander
 Caucasian Hispanic Multi-Group Puerto Rican Other

Education: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

Household's income in last 30 days: \$_____ # People in household: _____

Family Status: (check one) Single person Parent in 2-parent family
 Single parent w/ kids under 6 Other family member
 Single parent w/kids 6 to 18 Living w/ spouse or partner

Have you been divorced or separated in the past 5 years? Y N

Employment: Full time Part time Unemployed Student Other

TANF/Reach-up Benefits	Yes / No	Subsidized Housing	Yes / No
3 Squares VT (Food Stamps)	Yes / No	SSI Benefits	Yes / No
SSDI/AABD Benefits	Yes / No	Disabled	Yes / No
Family Self-Sufficiency Program	Yes / No	Voc Rehab client	Yes / No
General Assistance	Yes / No	Veteran	Yes / No
Public Housing	Yes / No	Fuel/Electric Assistance	Yes / No

Micro Business client? Yes No In the IDA program? Yes No

How did you hear about us? _____
 (This is very important to fill in!)

INSTRUCTIONS: Please answer all questions. For \$ amounts, give your best guess.

How financially secure do you feel now?	insecure	1	2	3	4	5	secure
How confident do you feel about your financial future?	not confident	1	2	3	4	5	confident
Do you have a checking account?	Yes / No						
Do you have a savings account?	Yes / No						
Do you save regularly ?	Yes / No						
What amount, if any, do you have in an emergency fund ?	\$ _____						
What amount do you have in other non-investment savings ?	\$ _____						
Do you use a system to track your expenses ?	Yes / No						
Do you use a system to budget your income and expenses?	Yes / No						
Are your bills current (not over 30 days due)?	Yes / No / Some						
Have you gotten your credit report in the past year?	Yes / No						
Do you have a secured credit card ?	Yes / No						
Do you know your credit rights ?	Yes / No						
Do you know what predatory lenders are?	Yes / No						
How much, if any, savings do you have in an IRA account?	\$ _____						
How much in a 401K or 403B account?	\$ _____						
How much in other investments ?	\$ _____						
Do you have assets ? House/Land value:	\$ _____						
Vehicle(s) value:	\$ _____						
Other (tools, jewelry, sports equipment, etc):	\$ _____						

How many credit cards do you have?	# of cards :	_____
What is your credit score ?	FICO score (300-850):	_____
Medical debt? \$ _____	In collections?	\$ _____
Utility debt (including gas, elec)? \$ _____	In collections?	\$ _____
Credit card debt? \$ _____	In collections?	\$ _____
Auto debt? \$ _____	In collections?	\$ _____
Student loans? \$ _____	In collections?	\$ _____
Mortgage debt? \$ _____	In foreclosure?	\$ _____
Other debt (cell phone, cable)? \$ _____	In collections?	\$ _____

Release
 I request services from Champlain Valley Office of Economic Opportunity's (CVOEO) Growing Money Program (GMP). By signing this form, I agree to participate in all follow-up surveys and evaluations. I understand that all information about me will be held in the strictest confidence and only used anonymously in aggregated reports. I understand that these reports are critical to continued funding of this program so that others may benefit. I understand that if I've supplied my e-mail address, I will receive monthly e-mail updates from GMP until I choose to unsubscribe. I further understand that program staff may not (1) recommend goods or services in which s/he has an interest, (2) accept fees or commissions, or (3) accept gifts. In consideration of the delivery of training and other services, I waive all claims against GMP, its parent agency and their staff. I hereby certify that the information given on this form is complete and accurate to the best of my knowledge.

Signature: _____ **Date:** _____

PLEASE BRING THIS COMPLETED FORM TO YOUR FIRST CLASS!
 Or mail to "CVOEO Growing Money Program" PO Box 1603, Burlington VT 05402
 Or e-mail to growingmoney@cvoeo.org.
 If you have questions, call Libby at 802-860-1417 x114.